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# USAID ECONOMIC GROWTH TRAINING (EGT) PROJECT ANNUAL REPORT 2013-2014

October 30, 2014

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## DISCLAIMER

The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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# ACRONYMS

AAR	After Action Review
AWP	Annual Work Plan
CBA	Cost Benefit Analysis
CEA	Cost Effectiveness Analysis
COP	Chief of Party
COR	Contracting Officer's Representative
dTS	Development Training & Services, Inc.
EG	Economic Growth
EGT	Economic Growth Training
EGLC	Economic Growth Learning Center
E3	Bureau for Economic Growth, Education and Environment
E3/EP	Bureau for Economic Growth, Education and Environment/Office of Economic Policy
E3/TRR	Bureau for Economic Growth, Education and Environment/Office of Trade and Regulatory Reform
GCC	Global Climate Change
KDMD	Knowledge-Driven Microenterprise Development
LOE	Level of Effort
LMS	Learning Management System
PMP	Performance Management Plan
PMT	Project Management Team
SOW	Scope of Work
USAID	United States Agency for International Development
VoPP	Voice over Power Point
WLC	Washington Learning Center

# EXECUTIVE SUMMARY

The USAID Economic Growth Training (EGT) Project is an extension of the technical leadership that is at the core of the mission of the Bureau for Economic Growth, Education and Environment (E3).

The EGT Project's goals are three-fold:

1. Create a common and shared base of technical knowledge for all Economic Growth (EG) officers;
2. Strengthen the sense of network and communities of practice among EG officers; and
3. Improve knowledge sharing and dissemination of best practices and lessons learned.

The EGT Project's objective is two-fold:

1. Train a critical mass of EG officers rapidly and cost-effectively through use of current classroom and distance learning technologies during the life of the activity; and
2. Develop the ability of EG officers to identify the key economic growth challenges and obstacles in developing countries and to design and manage practical program interventions to address these challenges effectively.

During the second year, the EGT Project conducted a range of training activities. Milestones of the second year of the EGT Project include the following:

- The Annual Report for the first year of the EGT Project and the Annual Workplan (AWP) for the second year were submitted to USAID on October 31, 2013.
- The EGT Project drafted a one-page project fact sheet and a communications strategy.
- The EGT Project tested the trade and investment certification course and placed it online on the Learning Management System (LMS), USAID University.
- The EGT Project provided logistical support for the following courses held at the USAID Washington Learning Center (WLC): Advanced Topics in Cost Benefit Analysis (CBA); Global Climate Change (GCC) Mitigation; GCC Adaptation; and CBA of Roads.
- In March 2014, the EGT Project designed a template for the E3 Newsletter.
- The USAID Clean Energy Lending Toolkit was pilot tested and implemented in Liberia in April/May 2014.
- From June 16-20, 2014 the EGT Project conducted the Economic Growth Overview Course at WLC and afterwards conducted an After Action Review (AAR) on August 12, 2014.

This annual report for the second year of the EGT Project is submitted to USAID on October 30, 2014 in conjunction with the AWP for the third year.

# I. INTRODUCTION

## BACKGROUND

The USAID Bureau for Economic Growth, Education, and Environment's Office of Economic Policy (E3/EP) and Office of Trade and Regulatory Reform (E3/TRR) offer a suite of courses to improve USAID officers' skills and knowledge of the principal components of economic growth (EG). The suite provides participants with a common understanding of:

- What USAID means when it discusses EG;
- The generalized approach USAID takes toward assisting EG;
- Diagnostic tools applicable for different program elements; and
- Good practices for USAID interventions, based on donor field experience.

Courses include: an introductory EG overview course; certification courses (financial sector development; and trade and investment); in-depth courses focused on specific components of EG: commercial law, enterprise development, finance, macroeconomics and trade; and a course on EG in post-conflict environments.

The courses utilize a blended learning approach, including: online materials for the pre-work component of the in-person EG overview course; online certification courses; and online as well as in-person in-depth courses.

## LIFE OF PROJECT ACTIVITIES

The life of this EGT Project contract is four years, with an overall ceiling of \$3,999,778.65. While the majority of activities under this contract will be conducted in Washington, DC, some activities may be conducted overseas.

## II. EGT PROJECT ACTIVITIES

This annual report describes the activities that took place during the second year of the EGT Project, from October 1, 2013 – September 30, 2014.

The annual work plan (AWP) for the second year explained that EGT Project activities will be conducted in the eight areas described below.

### **1. Develop, Implement, and Disseminate a Suite of Training Activities and Materials to Increase Economic Growth Knowledge:**

A brief description of each of the courses is provided below.

#### **a. Economic Growth Overview Course:**

The EG Overview Course was held from June 16-20, 2014 at the USAID Washington Learning Center (WLC).

As in previous iterations, the EG Overview Course curriculum covered six thematic economic growth areas: business enabling environment/regulatory reform; commercial law and institutional reform; enterprise development/competitiveness; financial sector development; macroeconomic policy and institutions; and trade and investment.

The curriculum included two components: 15 hours of online pre-course work and five days of in-person training that review:

- Macroeconomic policy for a supportive and stable business environment;
- Microeconomic policy for doing business;
- Enablers of private economic initiative – finance, infrastructure, and human resources; and
- Enterprise development and competitiveness.

The EGT Project supported the activity manager and course facilitator in planning, developing and conducting the course, which included the above-mentioned pre-course work, presentations, activities/exercises and case studies.

On August 12, 2014 the EGT Project conducted an After Action Review (AAR) of the EG Overview Course, during which it presented the participants' feedback about the course. The AAR included qualitative and quantitative feedback, described in section seven below.

#### **b. Certification Courses:**

The EG Certification Courses are on-line courses that provide participants in-depth training in the six thematic economic growth areas. A single course contains approximately 40 hours of on-line instruction, using a host of formats: Voice over PowerPoint (VoPP), video, on-line readings, etc. The



certification courses are 100 percent voluntary, providing USAID employees with the ability to further their professional development. USAID employees achieve certification if they pass the certification exam, a sampling of 50 questions randomly drawn from a course's bank of 500 questions. Certification appears in an employee's official records and is a means by which the employee may demonstrate competency in relation to the USAID employee skills matrix.

The trade and investment certification course was tested and placed online on the Learning Management System (LMS), USAID University on January 31, 2014.

Thereafter the EGT Project provided updates to USAID about the number of persons registered for the course. In addition, the EGT Project occasionally assisted participants who had technical difficulties with the course. In September 2014 the EGT Project interviewed the first person who completed the course to obtain feedback about the course and reported on this feedback to the COR.

### **c. In-Depth Courses:**

During the second year, the EGT Project provided logistical support for two in-depth courses.

The USAID Course Economics and Planning of Global Climate Change (GCC) Mitigation was held from April 28 to May 2, 2014 at the WLC. The Scope of Work (SoW) for the course included case study preparation (to be undertaken by sub-contractor Abt), identification of one instructor/trainer, hotel and accommodation for one trainer, course materials organization, course registration and course logistics (catering, materials, etc.).

The USAID Course Economics and Planning of GCC Adaptation was held from May 5-9, 2014 at the WLC. The SoW for the course included case study preparation (to be undertaken by sub-contractor Abt), identification of instructors/trainers, hotel and accommodation for four trainers, course materials organization, course registration and course logistics (catering, materials, etc.).

The two courses were pilot courses which were evaluated as successful.

In August 2014 the activity manager of the two GCC courses requested that the EGT Project provide logistical support for videoconferencing for two GCC courses in Mozambique: USAID GCC Mitigation Course from October 20-24, 2014 and USAID GCC Adaptation Course from October 27-31, 2014. The EGT Project began to scope and plan the videoconferencing in August 2014. This continued into September 2014.

### **d. Cost-Benefit Analysis and Cost-Effectiveness Analysis:**

Cost-Benefit Analysis (CBA) and Cost-Effectiveness Analysis (CEA) are two important analytical tools to assess and refine project designs, and establish baseline projections against which project success can be evaluated. CBA weighs costs against benefits, taking into account long-term impacts in a "with or without project" approach. CEA can reveal the most cost-effective method when the development objective is already given, taking into account true costs to stakeholders that may not be readily visible in the market.

During the second year, the EGT Project provided logistical support for two Cost-Benefit Analysis (CBA) courses held at the WLC. The course Advanced Topics in CBA was held from December 9-13, 2013. The course CBA of Roads was held from June 9-13, 2014. For the latter course, in addition to assisting with logistical arrangements, the EGT Project identified potential trainers for the course and sent USAID the CVs of potential trainers.

**e. CBA Fundamentals Workshop:**

During the second year of the EGT Project, no CBA Fundamentals Workshop was conducted.

**2. Develop and Implement a USAID Economic Growth Officers Conference:**

This event was not held in 2013/2014.

**3. Maintain, Update and Enhance the Economic Growth Learning Center Website:**

From April 1 through August 31, 2014 the EGT Project conducted an assessment of the Economic Growth Learning Center (EGLC) website, including an analysis of the readiness of the courses and functionalities (for example, online discussion groups) which could be transferred to the LMS, USAID University. The first component of the assessment entailed collecting all of the files from the Knowledge-Driven Microenterprise Development (KDMD) Project. The second component included saving the files on a newly (re-)created stand-alone EGLC website.

During the fourth quarter of 2014/first quarter of 2015 the EGT Project will make a recommendation to USAID about what to do with the EGLC website.

USAID may decide to transfer some of the materials from the EGLC website to the LMS, USAID University, provided: the content of the materials are still relevant, timely and useful; the materials can be converted from their current format into an on-line format compatible with USAID University; and the benefit of the conversion and transfer of the materials outweighs the cost.

**4. Provide Logistical Support and Oversight:**

The EGT Project provided logistical support and oversight to the activities listed in the EGT Project contract and described in sections one through eight of this annual report as well as to other activities requested by USAID and described in the separate section of this annual report following section eight below.

**5. Promote EGLC, EGT Training and EGT Resources:**

On November 1, 2014 the EGT Project drafted a one-page fact sheet about the EGT Project. The fact sheet is used to inform stakeholders about the EGT offered and the EGT Project.

**6. Work with E3 Economic Growth Staff, other USAID Staff, Technical Experts from Other USAID Contracts and Grants, and Outside Technical Experts to Meet Activity Objectives and Deliver Activity Products:**

During the second year, the EGT Project worked with E3 EG staff, other USAID staff, technical experts from other USAID contracts and grants and outside technical experts to meet the objectives of the training activities and events as well as deliver activity products (such as the above-mentioned template for the E3 newsletter).

For example, the EGT Project worked with different activity managers / course facilitators for the CBA courses, the GCC courses and the EG Overview course. A large number of USAID Staff served as day leads and speakers at the EG Overview course. Testing of the trade and investment certification course involved work with the activity manager for the course and sub-contractor Development InfoStructure Inc. (Devis). The pilot testing/implementation of the USAID Clean Energy Lending Toolkit in Liberia included work with USAID Washington, USAID Liberia, IESC Liberia and two sub-contractors: Abt Associates and Enclude. The assessment of the EGLC website involved work with contractor GLS, who implemented the KDMD Project.

## **7. Monitor Performance, Assess Impact, and Adjust Activities Accordingly:**

The Performance Management Plan (PMP) was submitted to USAID on February 8, 2013 and approved on March 26, 2013. The plan describes how dTS and USAID measure the efficacy of the training in achieving the EGT Project's goals, then adjust activities as necessary.

During the second year of the EGT Project, the EG Overview Course was the one activity which was comprehensively monitored and evaluated by the EGT Project itself through an AAR. (For some of the other courses, the EGT Project designed an evaluation, which was conducted by the activity manager/course facilitator.)

The AAR of the EG Overview course included: the qualitative and quantitative participant feedback from the online and in-person components; course organizer observations (including any Day Lead feedback); and the historical feedback context from previous courses. The participant feedback after this iteration of the EG Overview course provided a broader perspective, due to the variety of USAID backstops and geographies represented at the course.

The EGT Project delivered the results of the evaluation to USAID during the EG Overview Course AAR on August 12, 2014.

As a result of the AAR, it was determined that the majority of EG officers have attended the EG Overview Course and therefore it has completed its useful life cycle. Therefore, the EG Overview Course will not be presented in 2015. Instead, the EGT Project will work with USAID to design a new course based on the needs of USAID staff – both EG Officers and backstops.

## **8. Required Professional Skills:**

During the second year, the EGT Project Management Team (PMT) had the experience, expertise and skills necessary to achieve the objectives of the contract. Specifically:

Julie Dargis, Director, Capacity Development and Learning, dTS, provided corporate management of the EGT Project. Ms. Dargis has over 20 years' experience in the design and management of capacity building as well as training programs.

Geoffrey Mazullo, Chief of Party (COP), has over 21 years of experience working on capital market and corporate governance programs for USAID and other donors, including over 13 years as Chief of Party. In addition, he has 16 years of experience designing and conducting adult professional education, on topics including: corporate governance; corporate social responsibility (CSR); socially responsible investment (SRI); and sustainable development. He holds a Master of Science from the London School of Economics and Political Science and a Bachelor of Science in Foreign Service from Georgetown University.

Kate Hughes is Program Manager. Kate has over 15 years of experience in adult learning and training, including curriculum development and education coordination and has taught in 19 countries. Kate holds a Master's degree and a Bachelor's degree in Education and is prepared with a curriculum in Policy, Strategic Planning, and Instructional Design.

Sarah Ghoneim is Senior Program Associate. She has over six years of administrative and coordination experience working with a variety of institutions. She provides budget, contractual, editing and procurement support. She holds a Bachelor of Arts degree in International Affairs from George Washington University.

Bob Fine served as Website Specialist from April 1 – August 31, 2014.

#### **Other Activities as Requested:**

The AWP for year two explained that in addition to the above-mentioned activities/training courses specifically mentioned in the EGT Project contract, the COR may instruct the EGT Project to work on other training activities that fall under the SoW outlined in the contract.

During the second year, the EGT Project worked on several activities requested by the COR:

In March 2014 the EGT Project designed a template for a semi-annual E3 newsletter about economic growth.

The EGT Project conducted implementation / pilot testing of the USAID Clean Energy Lending Toolkit in Liberia in March/April 2014. The work was conducted by a clean energy expert from sub-contractor Abt Associates and a banking expert from sub-contractor Enclude. The work comprised three deliverables:

1. An (internal) diagnostic assessment of each of the two banks, assessing each bank's readiness to launch clean energy lending;
2. An (external) assessment of the clean energy lending market in Liberia; and
3. Feedback and lessons learned about the implementation process which would inform USAID about refining the USAID Clean Energy Lending Toolkit.

The initial report was submitted on May 8, 2014. USAID requested that additional information be added to the assessment of the clean energy lending market in Liberia. Updates were submitted to USAID in July, August and September 2014. The final report was submitted to USAID on September 25, 2014 and approved on the same date. USAID approval of the updated list and updated report/deliverables closed phase one of the implementation / pilot testing. USAID/Washington and/or USAID/Liberia will share the updated list with the two banks who participated in the pilot testing of the toolkit. The two banks will make a detailed and informed decision whether they would like to receive technical assistance to develop policies and procedures for clean energy lending (phase two). As a result of the Ebola outbreak, it is unclear at this time whether phase II could commence in the near future.

In September 2014 the EGT Project worked with USAID to scope the logistical requirements for the Inclusive Growth Diagnostics (IGD) Workshop which took place at the WCL on October 27-28, 2014.

# III. EGT PROJECT MANAGEMENT

## SCOPE OF THE ANNUAL REPORT

This annual report covers the time period October 1, 2013 – September 30, 2014.

### Overall Direction and Approach

The EGT Project contract is demand driven and responds to the needs of the E3/EP Office for various training.

The AWP for the second year of the EGT Project noted that some of the activities described are notional and might not be required during the second year of the project. Likewise, it was noted in the AWP that other needs that were currently not projected on the USAID EGT calendar might arise and might be implemented under this contract, as consistent with the overall SOW.

The COP communicated regularly with the COR during bi-weekly meetings. Also, the COP and EGT project staff communicated regularly with relevant EG officers in the E3/EP Office who served as activity managers and/or course facilitators of specific activities/courses.

### Staffing and Management

During the second year of the EGT Project, the level of effort (LOE) of the management and implementation staff was as follows:

#### Key Personnel

- Chief of Party, Geoffrey Mazullo (as of September 1, 2013) – up to 50% LOE;

#### Non-Key Personnel

- Project Director, Julie Dargis (as of October 1, 2013) – up to 10% LOE;
- Program Manager, Kate Hughes - 90-100% LOE;
- Senior Associate, Sarah Ghoneim (as of April 7, 2014) – up to 75% LOE; and
- Bob Fine, Website/Information Technology Specialist – 72.5% LOE for five months, from April 1 – August 31, 2014.

Time dedicated to the EGT Project each month varied in-line with the level of project activity.

The above-mentioned team worked from dTS's offices in Arlington, Virginia and was supported by corporate finance and accounting, contracts, human resources and information systems.

The EGT Project is implemented by dTS, in cooperation with approved sub-contractors Abt Associates and Development InfoStructure Inc. (Devis).

## **Monitoring and Evaluation**

The approach that the EGT Project utilizes for monitoring and evaluation (M&E) aligns with the overall dTS approach to M&E and incorporates Kirkpatrick's Levels of Evaluation methodology. This training evaluation methodology, along with the PMP plan, ensured that the project activities aligned with the stated goals of the project. In the second year, the EGT Project applied Kirkpatrick's Levels 1 & 2 to the EG Overview Course, recognizing that the participant feedback loop is vital to the course revision process and achieving the project's overarching goals. The EGT Project ensures that participant feedback is recorded, analyzed and incorporated into ongoing and future project activities throughout the course planning cycle, particularly in the post-course AAR. As the EGT Project progresses, the breadth of the activities deepens, and USAID requests M&E of specific activities, the EGT Project will conduct additional M&E as appropriate.

## **Communications and Collaboration with other Implementing Partners of EGT Events**

The EGT Project coordinated with other implementers providing training services to the EP Office and other relevant USAID offices.

## **Reporting**

The annual report for the first year of the EGT Project and the AWP for the second year were submitted to USAID on October 31, 2013.

This annual report for the second year of the EGT Project is submitted to USAID on October 30, 2014 in conjunction with the AWP for the third year.

# APPENDICES



## KEY SUCCESS STORIES

The EGT Project's pilot testing / implementation of the USAID Clean Energy Lending Toolkit in Liberia in March/April 2014 necessitated careful planning among dTS and its sub-contractors Abt Associates and Enclude as well as with USAID Washington, USAID Liberia and IESC Liberia. In addition, the clean energy expert from Abt Associates and the banking expert from Enclude met a wide range of stakeholders in Liberia to collect data about the clean energy sector as well as the banking sector. The pilot testing of the toolkit with staff of two Liberian banks was successful, demonstrated clearly by the interest of the two banks to move forward with phase two of the activity, namely, provision of technical assistance to each of the banks to draft policies and procedures to develop clean energy lending products. Following the pilot testing / implementation in Liberia, USAID Washington had numerous questions about the assessment of the clean energy sector in Liberia. The interaction with USAID in order to finalize the clean energy sector assessment involved ongoing analysis to pinpoint the range and types of data that would be relevant and useful. This collaborative exercise was a useful outcome of the first implementation of the toolkit and will inform future implementation of the toolkit.

USAID was extremely pleased with the logistical support the EGT Project provided to the two GCC courses held at the WLC in April/May 2014. After the courses, the course organizer wrote the following email: "Thank you for all of your great work on the climate change economics courses. I could not have done this without you." In August 2014 the activity manager of the two GCC courses requested that the EGT Project provide logistical support for videoconferencing for two GCC courses in Mozambique: USAID GCC Mitigation Course from October 20-24, 2014 and USAID GCC Adaptation Course from October 27-31, 2014.

Following the EG Overview Course conducted at the WLC in June 2014 the EGT Project conducted a comprehensive qualitative and quantitative analysis of participant feedback. On August 21, 2014 the EGT Project facilitated an AAR at USAID during which the activity manager and day leads engaged in a collaborative discussion. As a result of the AAR and other input, USAID has decided to design a successor course to the EG Overview Course.

## PROJECT ORGANIZATIONAL CHART

